

MAIL TO:  
Office of the Attorney General  
Registry of Charitable Trusts  
P.O. Box 903447  
Sacramento, CA 94203-4470

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1300 I Street, Room 1130  
Sacramento, CA 95814  
Telephone: (916) 323-5079

WEBSITE ADDRESS:  
<http://caag.state.ca.us/charities/>

## COMMERCIAL FUNDRAISER FOR CHARITABLE PURPOSES

### 2000 ANNUAL FINANCIAL REPORT

(California Government Code Section 12599)

Failure to file annual financial report by January 30 annually for each calendar year of solicitation may result in fines or filing penalties as defined in Government Code Section 12586.1 (Recently enacted).

An annual financial report must be filed for each event for each charity solicited for during the previous calendar year.



4

Name and Address of Commercial Fundraiser:

CF Number 663

Gift Planning Direct LLC

Name of Commercial Fundraiser

11500 West Olympic Boulevard, Suite 540

Address of Commercial Fundraiser

Los Angeles CA 90064

City, State, and ZIP Code of Commercial Fundraiser

Mail 5/1/2002

(Type of Activity)

Name and Address of Charitable Organization or Charitable Purposes:

CT No. 60663

F.E.I.N. No. 52-1363952

Citizens Against Government Waste

1301 Connecticut Avenue, NW

Address of Charity

Washington DC 20036

City, State, and ZIP Code of Charity

200 12/31/2002 to 200  
(Date or dates must be shown)

1.

#### REVENUE

- A. Cash contributions
- B. Entertainment sales or admission charges
- C. Sales from products
- D. Advertisement sales
- E. Membership fees
- F. Other sources: (Specify)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

#### G. TOTAL REVENUE

2.

#### EXPENSES

- A. Fees or commissions
- B. Salaries
- C. Payroll taxes
- D. Employee benefits
- E. Cost of merchandise for resale
- F. Cost of entertainment
- G. Postage
- H. Advertising
- I. Telephone
- J. Rental of equipment
- K. Facilities charge
- L. Permits
- M. Other expenses: (Specify)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

#### N. TOTAL EXPENSES

Expect revenues to be collected over the next ten years as a result of estate planning education of member prospects (see attached explanation)

ra. \* G.

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_
- D. \_\_\_\_\_
- E. \_\_\_\_\_
- F. \_\_\_\_\_
- G. \_\_\_\_\_
- H. \_\_\_\_\_
- I. \_\_\_\_\_
- J. \_\_\_\_\_
- K. \_\_\_\_\_
- L. \_\_\_\_\_
- Ma. \_\_\_\_\_
- Mb. \_\_\_\_\_
- Mc. \_\_\_\_\_
- Md. \_\_\_\_\_

*Please see attached breakdown of expenses.*

\$71,612.25 N.

3. Distribution or net to charitable organization or charitable purposes

4. (a) Is any officer, director, partner or owner of the Commercial Fundraiser in any way affiliated with or control, directly or indirectly, the charitable organization for which the Commercial Fundraiser has contracted to solicit?

☒ Yes ☐ No If "yes," complete the following:

Name of officer, director, partner or owner of Commercial Fundraiser	Name and address of charitable organization	Relationship of officer, etc. To charitable organization

(b) For each affiliation identified in 4(a), attach copy of the contract between the commercial fundraiser and the charity.

Under penalties of perjury, I declare that I have examined this report, including accompanying documents, schedules and statements, and to the best of my knowledge and belief, the report is true and complete.

Signature of authorized officer (Commercial Fundraiser)

Printed Name

Title

Date

This report is

organization for verifying the distribution.

Signature of \_\_\_\_\_

Printed Name

Title

Date

Signature

Printed Name

Title

Date

Registry of Charitable Trusts  
Attorney General's

JAN 3 1 2003

RECEIVED

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GIFT PLANNING DIRECT EXPENSE ALLOCATION

**Citizens Against Government Waste**

	71,612.25
PRINTING EXPENSES	10,838.36
SUB CONTRACT EXPENSES	11,916.27
PROGRAM MANAGEMENT EXPENSES	1,644.03
SALARY/CONSULTANT EXPENSES	7,560.49
	0.00
LICENCING/REGISTRATION FEES	4,581.14
DEPRECIATION	234.98
GENERAL OFFICE	663.95
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
GROSS PROFIT	34,173.03
Total	71,612.25



## **Gift Planning Direct Bequest Cultivation Program How Revenue Figures are Estimated**

Gift Planning Direct's **Bequest Cultivation Program** is a carefully planned and integrated approach, designed to educate existing charitable donors about personal estate planning and cultivate their long-term support. The program has nine steps or "points of contact" that include personalized letters, very specific and easily understood educational materials, and conversations with specially trained telephone representatives. Each point of contact is meant to educate, as well as personalize, the relationship between donor and organization.

The goals of the program are as follows:

1. To inform charitable donors how important it is to have a Will or Living Trust (over 60% of the population does not have a Will) and then assist them in creating or improving their plan so that it accurately reflects their personal goals and wishes.
2. To help charities identify existing donors committed to, or interested in learning more about, including a gift to the institution in their estate plan.

Though it's impossible to know for sure how much value charities will realize from our efforts (in part, because we don't know when donors will die), the estimates included on the enclosed Revenue & Expense Report are based on the following:

- Repeated studies (Gallup, National Family Opinion Research Center, National Committee on Planned Giving and our initial test results indicate that each participating organization will receive between 35 and 200 bequest commitments from every 5,000 prospects they introduce into the Bequest Cultivation Program. (Results vary based on the length of time each donor has been contributing to the institution and the ages of the prospects introduced into the program). If the average bequest to each organization is based on the U.S. national average of \$21,000, the net present value from this program over the next ten year period should be between \$735,000 and \$4,200,000 per 5,000 prospects.
- In addition, approximately only one out of six individuals will inform an organization of an intended bequest gift. So, an additional \$3.5 - \$21 million in bequest revenue should occur from each segment of 5,000 prospects as a result of our efforts (if national research on the matter holds true).

A handwritten signature consisting of a stylized lowercase 'd' followed by a vertical stroke and several loops.

116 968-8411